

People 5.2 ft

Selecting a Primary Record

PeopleSoft Financials 9.2 Web Query is a graphical tool that allows you to easily retrieve specific data from the PeopleSoft system. The data is retrieved by running predefined or custom queries. This job aid is designed to assist users in selecting a new record.

Query Manager

You will create new queries using Query Manager.

Navigation: Main Menu > Reporting Tools > Query > Query Manager

Favo	orites 👻 🛛 Main	Menu - > Reporting Tools - > Query - > Query Manager					
Or	RACLE		Home				
Query Manager Enter any information you have and click Search. Leave fields blank for a list of all values.							
		ing duery Create New duery					
	*Search By	Query Name • begins with					
	Search	Advanced Search					

You can use basic search page or advanced search page to select primary record. Basic search allows users to search for one field with the search criteria of "begins with".

ORACLE [®]										
Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run		
Q	Query Name New Unsaved Query Description									
*Search By Record Name										
Search Advanced Search										
Save	Save	e As	New Query	Prefe	erences	Properti	ies Put	blish as Fé	ed	New Union
Ref	turn To Sea	arch								





The advanced search page provides users with different options for searching for Record Name, Description, Uses Field Name, and/or Access Group Name. Also, you can search for items with a "contains" clause and not just "begins with".

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Records Query Expressions	Prompts Fiel	lds Criteria	Having View S	QL Run	
Query Name New Unsaved	d Query		Descriptior	1	
Record Name	begins with -				
Description	begins with -				
Uses Field Name	begins with -				
Access Group Name	begins with -			9	1
When using the IN or BETWEEN op	erators, enter comm	a separated value	s without quotes. i.	e. JOB,EMPLO	OYEE,JRNL_LN.
Search Clear	Basic Search				
Save Save As	New Query	Preferences	Properties	Publish as Fe	ed New Union
Return To Search					

The following steps will guide users in selecting a primary record through the basic search page.

In Query Manager, click **Create New Query**. Enter record name into search field. Remember, once you click **Search**, everything that begins with what is entered in this field will be displayed. The more info you enter in the search field, the more specific the results.



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Records Query Expression	ns Prompts Fields	Criteria Having	View SQL Run	1
Query Name New Unsa	ved Query	D	Description	
*Search By Record Name	 begins with 	th ASSET_AC		
Search Advanced Search	1			
Search Results	Personalize Find View		et 🚺 1 of 1 🚺 Last	
Recname		Add Record	Show Fields	
ASSET_ACQ_DET - Asset Acquis	sition Detail	Add Record	Show Fields	
Save Save As	New Query Prefer	ences Proper	ties Publish as l	Feed New Union
Return To Search				

Click **Show Fields** to view the fields for the record.

	Fields for record ASSET ACO DET - Asset	
Records Query	Fieldname Personalize Find 🖾 🛗 First 🔳	w SQL Run
Query Nam	Key Description	otion
*Search By	Y BUSINESS_UNIT - Business Unit	
Courth	Y ASSET_ID - Asset Identification	
Search	Y SEQUENCE_NBR_6 - Sequence	
	SYSTEM_SOURCE - System Source	
Search Results	DESCR - Description	
Record	CAPITALIZATION_SW - Capitalized	1 = 5 4 1 1 = = 5
Record	BUSINESS_UNIT_PO - PO Business Unit	
	PO_ID - PO Number	Fields
ASSET_ACQ_DET -	PO_LINE_NBR - Purchase Order Line Number	
Cause Save	PO_DIST_LINE_NUM - PO Distribution Line Number	Publish as Food
Save	SCHED_NBR - Schedule Number	Fublish as reeu
	REFERENCE_ID - Reference Number	
	BUSINESS_UNIT_AP - AP Business Unit	
Return To Sea	VOUCHER_ID - Voucher ID	
	VOUCHER_LINE_NUM - Voucher Line Number	
		<u>.</u>





Click the **x** in the top right corner of the list or the **Return** bottom at the bottom.

ORACLE [®]				
Records Query Expressions	s Prompts Fields C	riteria Having	View SQL Run	1
Query Name New Unsav	ved Query	D	escription	
*Search By Record Name	- begins with	ASSET_AC		
Search Advanced Search				
Search Results	Personalize Find View All	I 🕢 I 📜 🛛 Firs	et 🚺 1 of 1 🕅 Last	
Recname		Add Record	Show Fields	
ASSET_ACQ_DET - Asset Acquisi	tion Detail	Add Record	Show Fields	
Save Save As	New Query Preferen	ices Propert	ies Publish as l	Feed New Union
Return To Search				

Click Add Record to add the selected record.

The system will take you to the **Query** tab after adding a primary record. This is where you will select the fields you want displayed in your query. The remaining steps of creating a query will be covered in subsequent job aids.